DEPARTMENT OF WORKFORCE DEVELOPMENT
Secretary Roberta Gassman
201 East Washington Avenue
P.O. Box 7946
Madison, WI 53707-7946
Telephone: (608) 266-7552
FAX: (608) 266-1784
www.dwd.state.wi.us

State of Wisconsin
Governor Jim Doyle

DEPARTMENT OF HEALTH AND FAMILY SERVICES
Secretary Helene Nelson
1 West Wilson Street
P.O. Box 7850
Madison, WI 53707-7850
Telephone: (608) 266-9622
FAX: (608) 266-7882
www.dhfs.wisconsin.gov

TO: **Income Maintenance Supervisors**
Income Maintenance Lead Workers
Income Maintenance Staff
Workforce Development Boards
Job Center Leads and Managers
Training Staff

FROM: Amy Mendel-Clemens
Technical Assistance, Training & Education Section
Bureau of Eligibility Management
Division of Health Care Financing

BEM/DWS OPERATIONS MEMO

No: 06-31

DATE: 07/07/2006

FS	☒	**MA**	☒	**SC**	☐
CTS	☒	**CC**	☐	**W-2**	☐
FSET	☐	**EA**	☐	**CF**	☐
JAL	☐	**JC**	☐	**RAP**	☐
WIA	☐	**Other EP**	☐★		

PRIORITY: HIGH

SUBJECT: **Planning for ACCESS “Report My Changes”**

CROSS REFERENCE: Administrator’s Memo 06-04
Operations Memos:
04-40 Food Stamp and Medicaid Self Assessment Internet Based Tool (access.wi.gov)
04-63 Enhancements to the Online Self Assessment Tool (ACCESS)
05-38 ACCESS Check My Benefits Tool
06-15 Planning for ACCESS "Apply for Benefits" Tool and CWW Mail-In Data Entry Pages
06-18 ACCESS “Apply For Benefits” and CWW Mail-In Application Process and Data Entry Pages

EFFECTIVE DATE: ACCESS “Report My Changes” Tool – September 6, 2006

PURPOSE

This memo is intended as a planning tool for local agencies. Its purpose is to describe the new process for receiving and processing changes reported by customers through the ACCESS Report My Changes tool. Starting on September 6, 2006, Medicaid (MA), FoodShare (FS), Family Planning Waiver (FPW) and Caretaker Supplement (CTS) customers throughout the state will be able to report a new job, a job that has ended, or a change in an existing job through ACCESS. Over the next several months, more types of change reports (such as address, household composition, and expenses) will be added to ACCESS. These Change Reports may be processed by the primary caseworker, another worker, or the Change Center.

BACKGROUND

In 2003, the Department of Health and Family Services (DHFS) secured a $1.7 million Food Stamp Program Participation grant to develop and implement Internet-based access tools for the FS and MA Programs. This project is designed to increase participation in FS and MA, improve customer service and satisfaction, ease workload for local agencies and improve payment accuracy.

In August 2004, we launched the Am I Eligible? screening tool on www.access.wisconsin.gov (Ops Memos 04-40 and 04-63). In September 2005, we added the Check My Benefits tool to this website (Ops Memo 05-38). Apply For Benefits, the online application for FS and Family MA, was added on June 3, 2006 (Ops Memos 06-15 and 06-18).

Prior to designing the ACCESS Report My Changes tool, the ACCESS project team asked for input from supervisors and eligibility workers from about 60 local agencies, through regional supervisor meetings and Milwaukee County supervisor meetings, staff meetings with eligibility workers in Washington and Winnebago counties, and a meeting with the Dane County Call/Change Center.

REPORT MY CHANGES TOOL DESCRIPTION

Starting on September 6, 2006, recipients of FS, MA, FPW, and CTS will have an opportunity to report changes in job income through ACCESS. This tool is located within the existing structure of Check My Benefits (CMB), in which a customer views benefit information by first setting up a secure account.

Who Can Report a Change?
Any adult who is known to CARES may set up an account to view benefit information. In addition, minors who are a primary person or primary person's spouse may set up an account. If a person cannot set up a CMB account, s/he may not use ACCESS to report a change.

> **NOTE** ➢ Individuals whose case is marked "Confidential" by an agency cannot create an ACCESS account.

In Report My Changes, full-viewing individuals will be able to report changes for any case member who is open for benefits (or whose MA benefits have been closed for fewer than 30 days), regardless of the full-viewing individual's own eligibility status. Targeted-view individuals will be able to report only their own individual changes, as long as they are open for benefits or their MA benefits have been closed for fewer than 30 days. Each account holder will only be able to see the changes that s/he has reported and not the changes reported by other household members.

> **REMINDER** ➢ The Primary Person and Primary Person's Spouse are considered to be "full-viewing individuals." These individuals can view all of the information about their case. Adults on the case who are not a primary person or primary person's spouse are considered to be "targeted-viewing individuals." These individuals may only view information about their own benefits. More detail about security and access to data through CMB may be found in Operations Memo 05-38.

Customers will not be allowed to report changes through ACCESS if:

- They are part of a RFA that has not yet become a case.
- They are part of an unconfirmed case.

- They are part of a closed FS case or a MA case that has been closed for more than 30 days.
- They are SeniorCare-only cases.

Using ACCESS to Report a Change

Once logged in, the customer will be given the opportunity to report a new job, job that ended or a change in a job through ACCESS. Also, a list of other changes that the household **must** report, as well as a list of changes the household **may** want to report will display. This list of changes will be displayed according to the benefits that the customer is receiving. The customer is instructed to contact their worker or change center to report their other non-job related changes.

After selecting to report a change, ACCESS will display a list of the jobs currently on file for the household in CWW. The customer will check the box for each job that has changed or ended, as well as check a box to indicate that they have a new job to report.

For any job that has been selected on which a change is being reported, the customer will see a page that displays the employment details currently on file in CARES. The customer can then make changes to the information on the screen. If the job has ended, we ask for the end date of the job as well as the date of the final paycheck.

For any new job being reported, the customer will see a "Job Income Detail" page that asks for detailed information about the job.

The customer will not be allowed to report a job change that has an effective date that is later than the current or next month.

Once the customer has finished making his/her changes or adding new job information, s/he will review a summary of the information prior to submitting the changes electronically to the local agency. This will give him/her an opportunity to edit or cancel the changes entered. After submitting the changes, s/he can view (and print) a summary of the changes, a list of the types of proof s/he may need to provide, as well as a tracking number for the Change Report. Each Change Report submitted is assigned a tracking number. Like the ACCESS application tracking number, workers may search by Change Report tracking number using CWW Quick Select.

As with online applications, if a report is received by the local agency before 4:30 p.m. on a business day, the report date will be set for that day. If it is submitted after 4:30 p.m., the report date will be set for the next business day. For changes submitted on holidays or weekends, the report date will be set to the next business day.

CARES CHANGES

Change Report Inbox and Assignments

Change Reports can be viewed and managed through a set of new CWW pages that make up the Change Report Inbox. Each local agency will have one Change Report Inbox, which all workers may view and use. This Inbox is separate from the Local Agency Inbox used to view and manage ACCESS applications and RFAs.

The Change Report Inbox is similar to the Inbox for online applications, with one key change: *Change Reports will automatically be assigned to the primary caseworker of the case.* This model preserves the most flexibility for local agencies with Change Centers, and it also makes it easy to ensure coverage when a given worker is absent. Change Center workers may use the Change Report Inbox to select Change Reports for processing. Once a worker selects a Change Report to process, they become the "Change Report worker." This is a new term used to recognize the individual who processed the Change Report and it may be different than the assigned case worker. For example, the Change Center worker will become the assigned worker for the Change Report when he or she begins processing the change. If the case worker selects the Change Report to process, s/he will be recorded as the Change Report worker.

Worker's will be able to view the list of unprocessed Change Reports for which they are the Change Report worker by searching the Change Report Inbox OR through a new feature on his/her CWW Home Page: simply click the magnifying glass for Change Reports in the "My Tasks" section on the page.

Companion Cases
In the event of a companion case, the Change Report will be flagged as a companion case change; it will be automatically assigned to one of the workers based on program hierarchy. For example, if one case is an IM case and the other is not, it will be assigned to the worker on the IM case. As with conventional reported changes, the caseworker to whom the change is reported is responsible for communicating the change to the companion case worker as needed.

Processing a Change Report
All Change Reports are linked to a case when they are submitted through ACCESS since the customer had to log into ACCESS CMB to submit the change. Once a Change Report is selected for processing, the worker will be taken to the Change Report Summary page. The worker will begin processing the Change Report using a driver flow for processing changes. Workers will use the Employment Summary page to add the new job information or match the change information with existing sequences in CWW. This process is similar to the process for adding or matching Apply For Benefits information for someone who has a closed case in CWW. From there, the driver flow will bring the worker to the Employment Details page allowing the worker to view and act on the changes reported.

Managing and Viewing Change Reports
The My Task section on each worker's CWW home page will identify how many Change Reports for which they are the Change Report worker and will provide workers with a quick link to a view of the Inbox that is limited to just their Change Reports.

For management purposes, the Change Report Inbox Search Criteria will give agencies a simple count of the number of unprocessed Change Reports in the Change Report Inbox. Supervisors may also want to view the Change Report Inbox periodically to find and act on aging Change Reports. Change Reports not processed within five days will be displayed in bold, black text. Change Reports not processed within 10 days will be displayed in bold, red text.

TRAINING

Training for this initiative will be provided via a training Powerpoint available in early August 2006.

CONTACTS

Autumn Arnold
BHCE/DHCF/DHFS
(608)266-0157
Arnolad@dhfs.state.wi.us

★Program Categories – FS – Food Stamps, MA – Medicaid, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – Food Stamp Employment and Training, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WtW – Welfare to Work, WIA – Workforce Investment Act, Other EP – Other Employment Programs.